

**National Democratic Institute/Concern Universal
Training on Advocacy and Proposal Development**

Room Design:

Chairs in a horseshoe with tables/desks
Breakout/Work areas with tables and chairs

Objectives:

- To increase knowledge of NDI/CU potential partners on the meaning of advocacy
- To increase knowledge of the various components of an advocacy campaign
- To assist partners in developing a goal and objectives that are relevant to an advocacy campaign
- To assist partners in developing an advocacy campaign

Day One

Time	Activity	Person Responsible	Materials
8:15-8:30	Registration	Phaniso	Sign-In Sheet
8:30-8:40	Welcome Remarks	Janet/Maggie	
8:40-8:50	Review Objectives	Janet	Power Point
8:50-9:00	Introductions	Maggie	
9:00-10:00	<p>What is Advocacy?</p> <ul style="list-style-type: none"> - Participants will stand in a big circle. A ball will be tossed and whomever catches it must say one word that comes to mind when they think of advocacy. Answers documented on paper. - Analyze results by having putting them into groupings without talking. - Group discussion on answers and groupings. - Present what NDI is trying to achieve with its advocacy program. 	Janet- Facilitate Phaniso- Rappoteur	Ball Paper Pen Sticki Stuff Handout: What is Advocacy?
10:00-10:15	Tea		
10:15-12:30	<p>Identifying the Issue and the Solution</p> <ul style="list-style-type: none"> - Story - Discussion, Presentation 	Maggie	Handout: Identifying the Solution

Time	Activity	Person Responsible	Materials
	<ul style="list-style-type: none"> - Group work to develop goals and objectives - Pair organizations to swap and critique - Refine goals and objectives based on critique - Presentation of goals and objectives 		Case Study
12:30-1:30	Lunch		
1:30-2:00	Identifying the Issue and the Solution continued	Janet	
2:00-3:00	Identifying the Target <ul style="list-style-type: none"> - Everybody has a tag placed on their back regarding who they are. Without speaking, they are required to get into groups. - Discuss: What are the groupings? - Presentation on Targets - Group work 	Janet	Tags with Names Power Point Work sheet Handout: Identifying the Target
3:00-3:15	Tea		
3:15-5:00	Conduct Your Research <ul style="list-style-type: none"> - Presentation 	Janet	Interview Sample

Day Two

Time	Activity	Person Responsible	Materials
8:30-9:00	Recap of Day One	Janet	
9:00-10:00	Develop Your Core Message <ul style="list-style-type: none"> - Discussion, Presentation - Group Work 	Luke	
10:00-10:15	Tea		
10:15-11:00	Taking Action: <i>Public Awareness and Education</i>	Luke	
11:00-12:00	Taking Action: <i>Persuasive meetings with decision-makers (Lobbying)</i>	Luke	
12:00-1:00	Lunch		
1:00-5:00	Action Plans	Maggie	

I. What is Advocacy?

Definition

Advocacy is a process through which organized citizens strategically affect decision-makers for addressing a certain issue or interest.

Advocacy Phases

1. *Identify Your Issue*
 - a. *Identify the Issue*
 - b. *Define the Problem*
 - c. *Identify the Solution*
 - d. *Consider the Risks*
 - e. *Develop Goals and Objectives*
2. *Identify Your Targets*
 - a. *Primary*
 - b. *Secondary*
 - c. *Identifying allies and obstacles*
3. *Conduct Your Research*
4. *Build Coalitions*
5. *Develop your Core Message*
6. *Take Action*
 - a. *Public Education and Public Awareness Campaigns*
 - b. *Meetings*
 - c. *Petitions*
 - d. *Protests*
 - e. *Persuasive meetings with decision-makers (Lobbying)*

7. *Evaluating*

8. *Taking Follow-up action*

II. Identifying Your Public Policy Issue

IDENTIFYING YOUR ISSUE

The process begins by identifying an issue that requires policy action, that is, a problem that can be addressed by the actions of a governmental body.

Examples include:

- Achieving food security
- Improving the quality of health care or education
- Curtailing the spread of HIV/AIDS
- Making it easier for small enterprises to do business
- Preventing unscrupulous business practices
- Conserving natural resources

Questions to ask when selecting a public policy issue:

1. Is your issue timely?
 - a. Is there strong evidence that decision-makers are already concerned about the issue?
 - b. Are there new opportunities for effective action?
2. Is the specific problem perceived by a significant number of people?
3. Does the problem have a real impact on people?
4. Does the problem have governmental institutions you can target to address it?
5. Can you win?

6. Does the issue have the potential to motivate people?
 - a. Are there a lot of people who care about the issue?
 - b. Do people feel strongly about the issue?
7. Is it understandable by the average person?
8. Will the life of your beneficiaries improve after the problem is solved?
9. How much does it cost to solve the problem (human and financial resources)?

IDENTIFYING YOUR PROBLEM

A problem is one of the many things that must be overcome to deal with the issue.

Examples:

- Unproductive agricultural practices
- Poor conditions of service for health professionals or teachers
- Lack of motivation to avoid behavior that leads to the spread of HIV/AIDS
- Limited access to credit by small businesses
- Poor enforcement of a law intended to protect consumers
- Resistance to use of alternative fuels for cooking and heating

With regard to policy advocacy, the problem will also include a *law, government policy, government regulation or government practice* that needs to be changed.

Questions to answer when identifying the problem:

1. Who has the problem? How many people?
2. Where are they?
3. How long has the problem existed?
4. How do you know it is a problem?
5. What are the consequences of not solving the problem?
6. Why is your organization suitable for approaching the problem?

IDENTIFYING YOUR SOLUTION

A solution is your recommendation or suggestion to partially resolve the problem.

Examples:

- Reallocating funds for example from planting trees to providing incentives for communities that reduce their reliance on wood for fuel.
- Lobbying with or to parliament for the enforcement of legislation that is already in place.

What is the action that needs to be taken to address Problem? - Is there a need to create a new law or regulation, amend an existing law or regulation, or enforce an existing law or regulation?

Issues to consider when developing your solution:

- Has your solution been formulated in a participatory manner?
- Have you documented it in writing, with levels of detail that are appropriate for various audiences?
- Is your solution coherent, persuasive and uses information that you have collected in your research?

CONSIDER THE RISKS

Once the problem and the possible solution(s) have been clearly identified, consideration must be given to the potential risks of the advocacy campaign. By raising an issue and advocating for a public policy solution, the issue is in play and there is always a risk that the resolution is not the one sought. For instance, by asking that a sensitive environmental preserve be expanded in size, there is a risk that those who seek to economically exploit its resources will exploit this debate to argue that the preserve is already too large and should be reduced.

Advocates cannot always control the course of the debate, so the risk of a bad outcome may outweigh the likelihood of the resolution being sought. This risk must be honestly and carefully weighed before launching the campaign.

DEVELOPING YOUR GOAL, PURPOSE AND OBJECTIVES

Goal

A goal is a broad statement of the long-range benefits your organization is trying to achieve. As it is broad, a goal is difficult to measure and usually cannot be accomplished by or attributed to a single program. What the goal statement should do is give a better understanding of the general aim and direction of your organization's overall efforts. The goal should answer the question: **WHY** does your organization want to do this program? The goal should be one sentence.

Purpose

This is a simple statement that explains clearly what the project will achieve – i.e. what will have happened by the end of the project. Everything that you do in the project must move you towards achieving this purpose.

An advocacy purpose aims to change the policies, programs or positions of government institutions. The policy advocacy purpose must focus on a specific action that an institution can take. When choosing an advocacy purpose consider the political climate, the probability of success, research and data on your issue, money available to support your advocacy efforts, your organization's capacities, and your own capabilities.

Objective

Unlike a program goal, objectives (or results) are the specific and measurable *outcomes* of your organization's program. Objectives become the criteria by which a program's impact is measured. As such, each objective must specify—in terms of quality, quantity, and timeframe—what the end state of the program will be.

Objectives should logically and naturally relate back to the problem statement and goal of the program. Objectives are the specific and measurable change(s) in the situation your organization described in the problem statement. It could be an absolute change (by creating or establishing something), a relative change (by improving, increasing, decreasing, strengthening something), or no change (to maintain something).

Objectives should be targeted in terms of quantity, quality, and time, if possible. If any of these three are missing it will be unclear if your organization has been successful or not. There is a simple, step-by-step approach for targeting an objective, which is described below for the women in political decision-making positions program example.

Step 1: Identify Objective: To increase the number of women elected and appointed to decision-making positions.

Step 2: Quantify Objective: To increase to a minimum of 15% the number of women elected and appointed to decision-making positions.

Step 3: Set Quality: To increase to a minimum of 15% the number of well-qualified women elected and appointed to high-level decision-making positions in a transparent and accountable manner.

Step 4: Set Timeframe: To increase to a minimum of 15% the number of well-qualified women elected and appointed to high-level decision-making positions in a transparent and accountable manner, by June 2004, following the 2004 elections.

Note that although the overall goal is to increase the number of women in all government decision-making positions to 30% that level is unlikely to be achieved in the short time frame, which is why an incremental amount is chosen.

It is also important to remember that objectives are the *result* of program activities or inputs, but are not the activities or inputs themselves. One way to keep them separate is to think of activities as the *means* and objectives as the *ends*. When objectives are being confused with activities, statements tend to begin with words like *To provide, To establish*. On the other hand, your organization is more likely to be talking about objectives with statements that begin with words like *To increase, To improve*. Objectives answer the question: **WHAT** do we want to happen which will make it possible to achieve this goal? There should be 2-4 objectives.

III. Evaluation of Goals and Objectives

Name of Evaluating Individual and Organization _____

Name Organization being Evaluated _____

	Yes	No
Issue		
10. Is the issue timely?	_____	_____
a. Is there strong evidence that decision-makers are already concerned about the issue?	_____	_____
b. Are there new opportunities for effective action?	_____	_____
11. Is the specific problem perceived by a significant number of people?	_____	_____
12. Does the problem have a real impact on people?	_____	_____
13. Does the problem have governmental institutions that can be targeted to address it?	_____	_____
14. Can you win?	_____	_____
15. Does the issue have the potential to motivate people?	_____	_____
a. Are there a lot of people who care about the issue?	_____	_____
b. Do people feel strongly about the issue?	_____	_____
16. Is it understandable by the average person?	_____	_____
17. Will the life of the beneficiaries improve after the problem is solved?	_____	_____
18. Is the solution an inexpensive solution compared to other solutions?	_____	_____

Comments:

Goals and Objectives:

1. Does the goal state the broad reason what the organization wants to achieve? _____

2. Does the purpose state what the organization wants to achieve for this advocacy campaign? _____
3. Does the purpose involve the creation, amendment or enforcement of a law, government policy, government regulation or government practice? _____
4. Are the objectives and measurable? _____
5. Are there a sufficient number of objectives (not too many or too few)? _____
6. Are the objectives phrased properly? _____

IV. Identifying and Approaching Your Target

Every advocacy campaign has targets. The group's advocacy is directed towards impacting the target's decision in favor to the demands of the group. In order to do so, the target has first to be identified. The group then must determine what is the position of the target on the issue: whether the target is an ally or an opponent.

Once the appropriate public policy institutions are identified one must then identify the key personnel in each institution who can influence the outcome. It may be a key legislator, minister, bureaucrat, or elected official. The challenge is to identify the key personnel in the decision making process, both those who will support and those who will oppose the position. Similarly, identifying those interests and organizations outside government that may be allies and those that are likely to oppose the advocacy effort is essential in the strategic planning. Mapping support and opposition, both inside and outside government, will allow the advocacy campaign to rally support and blunt opposition.

STEP ONE: IDENTIFY THE TARGETS

For each campaign, there are two types targets: Primary and Secondary.

PRIMARY TARGET

The primary target is the decision-making person, body or institution that decides on the issue. The primary target is the person who has the power to give you and your organization what you want. It is the person to whom you will advocate.

It is essential to identify those institutions of government and those individuals in government who are in a position to enact or block the desired policy outcome. The solution may lie with an administrative body who enacts regulations or enforces standards, with the courts to force the executive branch to act according to law, or with the Parliament and passage or amendment of a statute. It is often necessary or advisable to pursue policy solutions in more than one forum. But in every case one must clearly examine any and all possible forums available to enact or block the public policy position you seek to effect.

Advocacy Purpose:

To pass a law to mandate and fund the building of 100 community schools for girls.

Primary Targets:

Minister of Education, Minister of Finance, President, Members of Parliament

“Personalize the target.” Even if the power to give you what you want is actually held by an institution, such as a district council, the

parliament, or a ministry, personalize it. Find out the name of the person who can make the decision, or at least strongly influence it. Make that person the target. Not only does this help to narrow the focus of the campaign, but it makes your members feel that winning is possible. A campaign to change a person's mind is much more believable than one to change the policy of a big institution. In addition, individual decision-makers have human responses, such as fairness, guilt, fear, ambition, vanity or loyalty. These do not exist in institutions or formal bodies as a whole. Such responses can only come into play if you personalize the target.

Questions to ask when identifying primary targets:

1. Who has the power to give you and your organization what you want? Who makes the decision regarding the law or policy or who is responsible for enforcing it?
2. What power do you have over them?

SECONDARY TARGET

Secondary targets are those people who do not have the power or authority to give you what you want but has the power to influence the primary target. Although secondary targets might not have the direct mandate and authority to decide on the particular issue, they have the ability to influence. Usually you will have more power over this person than you have over the primary target.

Some members of a primary target can also be a secondary target if they can influence other decision-makers. For example, the Minister of Education and Principal Secretary might influence one another's opinions. Or the Parliamentary Committee on Education might influence the body of Parliament as a whole or the Minister. Therefore, they are both a primary and secondary target.

Advocacy Purpose:

To pass a law to mandate and fund the building of 100 community schools for girls.

Secondary Targets:

Key staff of Members of Parliament, advisors to the Minister of Education, Minister of Finance, key women's NGOs, parent organizations, teachers' unions, newspapers that

2. What power do you have over them?

Questions to ask when identifying secondary targets:

1. Who can assist you in convincing the decision-maker to give you and your organization what you want?

STEP TWO: IDENTIFY THE POSITION OF THE TARGET

ALLIES OR OPPONENTS

Once you have decided who your primary and secondary targets are you need to decide whether they are your allies or your opponents. Allies are those people, organizations, and/or institutions that might help you. These are the ones that you should solicit to work with you to obtain your goal.

Questions to ask when identifying allies:

1. Whom does the issue also affect?
2. Who would also benefit from resolving the issue?

3. Who might be interested to help us out?

Opponents are those whom are interested to see the issue not addressed or the advocacy campaign fail. Opponents are those interested in impeding the group in its advocacy campaign. These can be powerful and weak, depending on the actual strength they have for impeding the work of the group. Ones that are directly damaged by the campaign are usually listed as powerful. It is important for you to put effort into turning opponents into allies.

Questions to ask when identifying opponents:

1. Who would be damaged if this issue were addressed?
2. Who might be interested to see this campaign fail?
3. Who might act as an obstacle for any reason?

V. Policy Map

In filling out the chart, be expansive. Particularly for the Secondary Targets, you should come up with as many names as possible. During your campaign, you may not get to all of them, but you can come back to the list later if you need additional support. First brainstorm your list, thinking of as many targets as possible. After you have made your list, try to prioritize.

Advocacy Purpose:		
Primary Target (List Institution, Position and Name of Individual, if known)	Ally or Opponent or Don't Know	Secondary Target (who can influence the individual who is the Primary Target)
1.		1. 2. 3. 4.
2.		1. 2. 3. 4.
3.		1. 2. 3. 4.
4.		1. 2. 3. 4.
5.		1. 2. 3. 4.
6.		1. 2. 3. 4.

Opponents

List all the groups, individuals or institutions that stand to lose or be very upset if you win. These people are not necessarily your primary targets, as they might not have direct influence in getting you what you want. They may not be secondary targets as they are not likely to help you influence the decision-makers. However, they are individuals or institutions that, if they decide to, may block you from getting what you want. The idea of making the list is to be aware of who they are. You may have to find ways to neutralize them, but even if there is nothing you can do, it is best to have some idea of what to expect from them.

Institution	Name and Position of Individual	Their interest in the issue

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VI. Conduct Your Research

You will be ready to outline your advocacy campaign and plan the research plans of the campaign after you complete the following tasks:

1. Decide on a broad issue for advocacy
2. Select one specific problem related to the issue as the focus of your advocacy campaign
3. Make an initial decision on a solution (or partial solution) you want to propose.

Any effective advocacy campaign must first assess whether or not the political environment in which it will be conducted is reasonably receptive to both the advocacy organization and the issue. A campaign for constitutional reforms may not be viable in a particular political environment, whereas a campaign to protect environmentally sensitive regions may be. The political assessment will also guide the decisions made throughout the strategic plan. Decisions about how issues are framed, the institutions and decision makers to be targeted, the message and messengers to be used, and the coalition to be assembled are all informed by the assessment of the political environment.

During the research phase of your campaign you will test your understanding of the problem and the practicality of your proposed solution. You may believe you already know the answers to some of these questions. You still must do the research to verify and document your assumptions. You may be surprised to find out that people whom you expect to agree with you have different views on the matter.

Research on the Problem

- What is the history or cause of the problem?
- What is the extent of the problem?
- Whom does the problem affect?
- What impact is the problem having on individuals and the community?
- Who has the power and responsibility to directly address the problem? Who are the primary decision-makers?
- What steps have they taken to try to solve the problem?
- Why haven't they succeeded?
- Are there policies, laws, regulations, or programs already in place that are intended to solve the problem, or that make solutions difficult?

Research on the Solution

- Will your recommendation help solve the problem?
- Is your recommendation realistic?
- Can it be implemented without much expense?
- Is it easy to understand?
- Will it achieve tangible results in a short period of time?
- Who will be in favor of your recommendation?
- Will they actively support your advocacy campaign?
- Who will oppose it or be skeptical about it?
- Can you convince them it is a good idea?
- Do you believe your recommendation will be well-received?
- If not, is there another solution that might be more feasible or appealing to the decision-makers?

Research on Your Message

The information you gather doing research is **not** your message. Your recommendation is **not** your message. Your message is one simple, convincing reason that will persuade decision-makers to accept your recommendation.

It does not matter what you and your supporters think are good reasons for taking your advice. All that matters is what the decision-makers think about the reason you give them for taking your advice.

You may recommend an intensive campaign to improve hygienic conditions in health clinics and hospitals as a partial solution to problems caused by health professions leaving their jobs. You may also explain how your organization and other supporters can help with this campaign. There may be many good reasons for doing what you suggest. However, if the decision-makers are most concerned about financial constraints, your best message might be, “We need low-cost strategies to keep nurses and doctors on the job.”

Understanding the Decision-Making Process

As an advocate, you must become extremely familiar with the decision making process that you are attempting to influence. The more you know about the process, the more power you will have to influence it.

It is important to know the formal rules and procedures of the decision-making process. Using the formal process has several important benefits. This policy or program change is official, "on record" and more permanent. The decision-making process will also likely be more participatory and open to your ideas and proposals in the futures, thank to your efforts.

But, what if you cannot achieve your advocacy objective through the institution's formal decision-making process? It is important to know that change can be achieved at many different levels. If the formal process fails, you may be able to succeed through more informal "behind-the-scenes" practices or even by seeking an alternative process. These three decision-making processes are defined and explained in this module.

People and Organizations Who Can Provide This Information

Your Own Organization

Speak to people in your own organization first. Ask them all the questions listed above.

Primary decision-makers and their technical consultants and donors

Before you start your research, make a list of government officials, technical consultants, and donors who might be able to answer your questions. Communicate directly with the institutions and individuals who seem to have the power to make decisions that could solve the problem. Ask them the same questions. You don't have to start at the top with ministers and principal secretaries. Heads of departments are excellent sources of information and feedback.

Prospective supporters and opponents

Under the section on Targets you identified your allies and opponents. These individuals should also be asked the questions on the problem and the solution.

People who are affected by the problem

Be sure you have input on the problem and on your recommended solution from people who are directly affected by the problem. These may be citizens at the grassroots, individual service providers, etc. If your organization deals with people affected by the problem, use your normal channels of communication to reach them.

Tips for interviews

- Face-to-face meetings are the best way to obtain information.
- If resources make this impossible, interview at least key supporters in person.
- Make a list of questions you intend to ask each person to guide your discussion.
- Ask specific questions and get specific answers. If someone you interview does not have answers, ask him/her for names and contact information for people who do.
- Keep notes on all conversations, with dates and names of people you contact.
- Send thank you letters to everyone you contact, confirming your understanding of what they told you. Keep copies of the letters.
- Get your facts straight. Be sure to list sources for all information. Verify that your sources are reliable.

Other research techniques

- Get information from public records, i.e., books, reports, newspapers, newsletters, etc. If there are laws and regulations that deal with the problem, get them and read them yourself.
- Speak to those who are experts on the subject.

Questions to ask about research:

1. Have you identified the relevant government agencies and parliamentary entities and their roles in the issue?
2. Do you know how much information they have about the issue?
3. Do you know their positions on the issue?
4. Have you solicited input from the general public?

5. Have you collected existing information and data on the issue?

VII. Coalition Building

What is a coalition?

A Coalition is a group of people/entities that cooperate towards achieving a common goal.

Why form coalitions?

“Unity is Strength”

The purpose of any coalition is to increase the chances for success. Coalitions exceed the power and ability to perform and therefore the effectiveness of people or groups that act on individual bases. Coalitions provide more credibility and add to the resources, human, logistical and financial. Coalitions result in involving more people and entities directly involved in the effort and therefore help reaching out to and sensitizing a larger public opinion on the issues. Coalitions can bring about many more creative and interesting ideas and tactics. Your leaders can learn how other sectors of society and even other NGOs approach issues.

Coalitions can be formed with other citizens, groups of citizens, media, NGOs, political parties, election officials or other institutions. Coalitions have their dangers as well and that is one group undermining the work of the other partners in the coalition in an effort to take credit and advantage for the work done.

Groups need the understanding and consent of their decision-makers. The best way for accomplishing this result is to have these decision-makers on the side of the groups advocating.

Challenges in forming coalitions

Coalition building isn't easy, even if common values and goals are held. Coalitions can cause many frustrations and lead to many compromises during your advocacy campaign. For example, some NGOs that you are working with may want to use strong and confrontational tactics while others may want to spend time negotiating to accomplish the campaign goals. Problems can occur in Coalitions because of the differences in size and reputation of each of the coalition's members. If you invite a larger, more well-known NGO to join a coalition with you, it may get all

the credit for your advocacy campaign. So even if your campaign is furthered, it may hinder the growth of the organization. Worse, in some cases, larger organizations may “swallow-up” smaller organizations.

Types of Coalitions

Coalitions in general can be formal, temporary, permanent, single-purpose, multi-purpose, geographical or whatever affiliation the group members want.

What is needed to form a coalition

A strong coalition facilitator is advised! It is the person who can help you to reach a common vision, amongst the many competing interests. This person is particularly important when your campaign involves all sectors of society (civil, business and government). **Ground rules on how decisions are made the rules of the coalition should be set at the beginning.** Does a large group bringing lots of resources have the same vote as a small newly established group? These are the types of questions that need to be decided early on in the formation of the coalition.

Questions to ask before building a coalition:

1. Why should your group create a coalition? Will the campaign gain for utilizing a coalition?
2. Whom could you form a coalition with?
3. Why would the individuals or groups identified above want to join your advocacy campaign? What is their self interest?
4. Are there any specific individuals or groups that we strongly need as a part of the campaign in order to influence our targets?
5. What could each member of the coalition do to advance the groups’ goal? What differing skills and resources will each member bring?
6. How much training will the coalition partners need on the public policy issue before the coalition is able to move forward with the strategy?
7. Is association with one group or one individual going to negatively affect the campaign?
8. What would the coalition as a whole concretely do?
9. Can the group be cohesive enough?

VIII. Message

The Message should be the message contained in *all* public materials. These messages are relayed over and over again – in newspapers, newsletters, fliers, brochures, billboards, radio, letters to Parliament and government agencies.

There are five elements to the message:

Content/Ideas: What ideas do you want to convey? What arguments will you use to persuade your audience?

Language: What words will you choose to get your message across clearly and effectively? Are there words that you should or should not use?

Source/Messenger: Who will the audience respond to and find credible?

Format: Which way(s) will you deliver your message for maximum impact? e.g. a meeting, , letter, brochure, or radio ad?

Time and Place: When is the best time to deliver the message? Is there a place to deliver the message that will enhance its credibility to give it more political impact?

Content of the message

A “message” is a concise and persuasive statement about your advocacy purpose that captures what you want to achieve, why and how. Since the underlying purpose of a message is to create action, your message should also include the specific action you would like the audience to take.

Elements of message content:

- **What** you want to achieve;
- **Why** you want to achieve it (the positive result of taking action and/or the negative consequence of inaction);
- **How** you propose to achieve it; and
- **What action** you want the audience to take.

Often a message will have two basic components:

- an appeal to what is right and
- an appeal to the audience’s self-interest.

Content of the Slogan

Messages are often translated into slogans. A slogan is:

1. Short, easy to memorize
2. Truthful, real and based on facts
3. Clear, uncomplicated, straightforward and easy to understand
4. Must be important to the audience you wish to reach
5. Speak to the heart
6. Must be *repeated* and **repeated** and repeated.

The **message** you may want to convey to parliamentarians is:

Involving men is the key to reaching Malawi's family planning goals. Investing in family planning education programs for men brings birth rates down. Pass the Men's Family Partnership Act now.

The **slogan** could be:

Father's Count: Support the Men's Family Planning Partnership.

Goals of the Message and Slogan

1. To initiate action
2. To attract attention
3. To deliver invitations/appeals
4. To increase public awareness
5. To express the group's stand.

Audience

The message should be tailored to the audience that it aims to impact. One of the most effective ways to build awareness about your issue and to generate backing for your goal is to divide your audience into groups and develop a "message" to which each group will respond. For example, a message to politicians would differ from the message to the citizens, or a message to farmers would be different from the message to school youth.

Audience 1: Primary Targets: Decision-Makers

Content:

Messages should be short, concise, and persuasive. As stated above, it can be beneficial to communicate (sometimes subtly) how your proposal enhances his or her political or social standing – in other words, their self-interest. Economic arguments such as the potential budgetary savings or benefits are always good to include when possible. Policy-makers will also want to know what action you would like them to take and who else supports your proposal.

Format:

- formal or informal face-to-face meetings
- informal conversations at social, religious, political or business gatherings
- letters: personal, organizational, or coalition
- briefing meetings
- fact sheets
- program site visits
- pamphlets or brochures
- graphics or illustrations
- short video presentation
- computer presentations
- newspaper articles or advertisements
- broadcast commentary or coverage

Dear Decision-Maker:

Malawi's family planning program has reached a plateau. More money invested in the current program will not noticeably reduce growth rates as long as the demand for family planning among men remains low. The key to increasing the demand for family planning is to decrease the number of children men want their wives to have through persuasive family education programs. **A small investment in education programs for men will yield a large return.** We would like to request a meeting with you to discuss this further.

Sincerely,
NGO

Audience 2: Secondary Targets: Advocacy Organizations

Content:

Advocacy organizations need specific information to support their arguments. Research and data are used when facts and figures are presented clearly. Because advocates often insert facts directly into

their materials targeted to decision-makers, design the content for a policy audience.

Format:

- Meetings with organization's leaders and staff
- Ready-to-use fact sheets
- Graphics or illustrations
- Briefing meetings

Audience 3: Secondary Targets: Media

Content:

The press generally likes to know how a situation affects individuals and often reports “human interest stories.” That is, they use someone's personal experience as an example. The media are also usually interested in new, ground-breaking information or how the an issues relates to current happening. The sexier, the better.

Format:

- Press Release
- Press Conference
- Issue Briefing for Journalists
- Graphics or Illustrations
- Fact Sheets
- Media packet/press kit
- Letter to the editor

Audience 4: Secondary Targets: General Public

Content:

Messages to the public should be simple, clear, concise, persuasive and action-oriented. People will often want to know how a program will affect or benefit them.

Format:

- promotional items: banners, t-shirts, buttons, hats
- presentations at community meetings
- pamphlets, brochures, fliers
- newspapers ads or articles
- fact sheets
- radio shows
- television shows or news

Language

Successful messages often incorporates words, phrases, or ideas that have positive connotations or that have particular significance of a target group. Words such as “family”, “independence”, “well-being”, “community”, or “national security” are some examples.

Message

Audience	
Action you want the audience to take	
Message Content	
Format	
Messenger	
Time and Place of Delivery	

IX. Taking Action

As was mentioned early, you must approach each Target individually. Each target will be influenced by a different message based on their own interests. Each target will require a different strategy depending on whether they are your ally or opponent and depending on how well they understand the issue.

IDENTIFY THE STRATEGY FOR CONVINCING YOUR TARGETS

There are three strategies based on the amount of agreement/disagreement between your organization and your target.

INFORMATIONAL STRATEGY

Assumes that your primary target, the general public and other organizations do not have enough information to make a decision regarding your issue. Therefore, your organization must spend time educating people on the importance of your issue. The Informational Strategy most often includes the use of the media and other promotional activities. Other activities include round table discussions and public debates. The purpose of the Informational Strategy is to reach an agreement, so that people (the general public, other NGOs and the target) can be moved to action on your issue.

The Informational Strategy is one that is used in every advocacy campaign. One of the underlying goals in all advocacy campaigns is involving the public, other NGOs and even your targets. One way of involving them is by educating them on the importance of your issue. When employing this strategy, you must determine how to reach as many people as possible and how to make your message heard in the best way.

The advantage of using the Informational Strategy is that it is relatively easy. There is often little or no conflict involved in providing information. Conflict comes later when you ask for decisions to be made and acted upon.

One disadvantage of using the strategy is that *it rarely works on its own*. Education is generally not enough to bring about social change, action is usually required. Further, it is difficult to determine if you have effectively reached your targets with the message that you intend.

Questions to ask when implementing the informational strategy:

1. What is my message?
2. Who am I trying to reach? Is there more than one target?

3. Is my organization clear on the steps needed to carry out this strategy? Have I prepared my members to know what to say and how to say it?
4. What resources is my organization willing to commit to this strategy?
5. How long with the strategy take?

COLLABORATIVE STRATEGY

Assumes that concern about the success of your campaign is shared by the public, other NGOs and even your target. There are no apparent major philosophical disagreements that will arise. You may start with an Informational Strategy and when an individual or organization is convinced by your message, you may move to a Collaborative Strategy with them. However, if you can identify allies who already understand and agree with your goal then you can immediately start with a Collaborative Strategy.

In a Collaborative Strategy, a common message and course of action amongst different/many organizations for the campaign must be facilitated. Some tactics that can be utilized include coalition building, providing expert or supporting testimony to Parliament, and holding joint events (meetings, press conferences).

Using a collaborative strategy means working together. Organizations and people have common values and therefore working together will help your organization reach its goal quicker and more efficiently than working alone.

For more about a Collaborative Strategy, see the section on Coalition Building.

CONFRONTATION STRATEGY

Assumes that the disagreement is so intense that discussion, negotiation and dialogue will not work. Targets do not or will not recognize your issue and sometimes even your organization. Most often in this situation if your organization wins the advocacy campaign, your target will stand to lose something. Common tactics in a confrontation strategy include mass demonstrations, strikes, and boycotting.

The Confrontation Strategy is often the strategy of last resort. When all other strategies and tactics fail, an organization may be forced to employ a confrontational strategy. Of course, there are varying degrees of confrontational tactics as well, so when choosing to employ confrontation measures, it requires a selection of tactics that gradually become more confrontational.

There are advantages of the confrontational strategy. They can be fun! Fun tactics can lead to great community support if they are done right. Another advantage is that they can lead to success. Many significant historical social changes have been the result of the use of confrontation in advocacy campaign. Defeat of the Third Term Bill is such an example.

One of the disadvantages of a confrontational strategy is that it may alienate the public. Public support is essential for an NGO to be successful, so if the confrontational strategy is implemented too soon, vital public support may be lost. Confrontational Strategy may also cause your primary target to try to repress your voice and opinion. Therefore, it is important that the message of your campaign is in the public arena before you employ a confrontational strategy.

Questions to ask before you engage in a confrontational strategy:

1. What will the confrontational strategy get you?
2. Are you sure that your members will support you if you use this strategy? Are people sufficiently aware of all the steps that you have taken in order to get you to this point?
3. Will the strategy get you closer to winning?
4. Have you picked the right target? If you have picked the right target, are you sure that you are clear about what you are fighting about? What does your organization see the problem as being? Are you sure?
5. Have you done the right research?
6. Saul Alinsky, one of the most famous community organizers from the US, said that, "Sometimes the threat is greater than the action." If you are threatening to use a confrontational tactic, is the threat real? To retain credibility, make sure that whatever you say during the advocacy campaign is true.
7. Have you thought about the risks involved in implementing a confrontational strategy? Are you prepared for those risks?
8. Have you analyzed all possible outcomes and planned for each one?
9. How will the target respond to your tactic? How will you respond to their response?
10. Is everyone involved in the tactic clear about the responses are?
11. Who do you need to contact before implementing your tactic? Will anyone be affected negatively by this tactic?
12. Who should participate?
13. How will you reach the media?
14. How will the media respond to the tactic?

X. Lobbying

Advocacy and Lobbying are often used as synonyms. It's important to explain the difference between these two. Lobbying can be perceived as direct advocacy. It presents a tool for advocating. In general, lobbying is an important activity as part of the advocacy campaign.

Meeting with decision makers or other important audiences is where preparation meets opportunity. Often, these opportunities are brief and you may have only one chance to make your case, so making a presentation that will persuade and inspire your audience requires solid preparation.

Who can lobby:

- Citizens in individual manner
- Citizen groups
- NGO representatives
- Insititon or elected representatives on individual or group basis

Why lobbying:

- Exchange ideas
- Convey message and collect information
- Discuss the problem/issue
- Cultivate relationships
- Coordinate efforts, organize activities
- Get and give advice
- Persuade others regarding the goal
- Reach an agreement or a compromise
- Gain support

Who should groups lobby to:

- Elected officials
- Government official
- Citizens with influence in a community
- Organization and institution representatives

- Potential allies and donors
- Media

Before the meeting the group should:

- Have a clear idea what the purpose of the meeting is; Make clear what the group wants to accomplish at that meeting;
- Know the people that they're meeting with
- Have accurate information relevant to the issues discussed
- Define possible contradicting points and prepare for them
- Decide the person or people that will go to the meeting and have their roles predetermined

At these meetings, the groups should bring along written and other materials that can make the case, as some people learn by reading and others learn by listening.

During the meeting the group should:

1. Stay focused on the issue
2. Start with a short, clear, powerful message
3. Stay positive
4. Don't fall to provocations
5. Listen carefully to what is said.
6. Deliver the whole message
7. Ask the official for concrete support
8. Don't discourage if the official wasn't responsive
9. Thank the official for the time and look for possibilities to arrange another meeting

After the meeting, the group should:

1. Provide additional information
2. Write a thank-you letter
3. Continue with other meetings until the issues is addressed